

At the heart of distribution

As the market leading provider of technical solutions for the financial services industry, 1st - The Exchange have a unique research led insight into the diverse requirements of the consumer including their preferred route to receive financial advice – and the many different models available to organisations in order to effectively distribute financial services.



Who are we?

1st - The Exchange have extensive experience of the design and delivery of market-leading CRM systems, call centre capability, portal solutions and outsourcing services to the financial services industry.

Our clients include some of the biggest FTSE 100 organisations including private bankers, wealth managers, financial planners and mortgage-brokers. We are proud to be at the heart of distribution with market defining products... [Show me >>>](#)

What do we do?

1st - The Exchange provide you with all you need to run your business no matter what part of the financial industry you are from.

We offer solutions for Administrators, Advisers, Straight Through Processing, Portal Services, Front Office and Back Office. If you would like to see all our Solutions, please look at our [Solutions page](#)

How do we do it?

1st - The Exchange offer a large, multi-channel and integrated solution, with [developed products](#) tailored to your individual requirements that builds upon existing and proven technology to appeal to all customer segments via face-to-face, telephone or internet. Agility and flexibility are the key requirements of our customers, along with a complete, single platform solution to include point of sale technology that fully integrates with all customer data, regardless of the client's choice of customer interface.

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